

**CMEL Pre-Proposal Conference
Minutes dated 2/6/07**

- FAA CMEL Director, Jay Weisz provided the welcome and acknowledgement of the SIR representing a “new” requirement. He emphasized that training is competency based learning, extensive, and a diversified program. He explained that there are some differences from current program. Some requirements may be different than what has been conducted before.
 - FAA CMEL Program Manager, John Leuth provided facility and security requirements while visiting on-site today. John Leuth explained restrictions for attendees limited to front desk, cafeteria, the meeting room and bathrooms without an escort. These are not associated with the SIR .
 - FAA Aero Center Contracting Officer (CO), Avis Franklin provided opening remarks including appreciation to attendees for participation and acknowledging the purpose and “new” requirements. The discussion included the following:
 - a. The Contracting Officer is located at the FAA Aeronautical Center FAA Oklahoma City, OK. The Center is now a part of the FAA Academy located in Oklahoma City. Contracting Officer responsibilities are to advise and participate in product team discussions regarding industry, business relations, statute and policy. The FAA policy is provided via the Acquisition Management System (AMS). The CO is responsible for issuing the screening information request and ensuring that all of the proper documentation for the contract is prepared prior to award.
 - b. Requirements support FAA Center for Management and Executive Leadership, FAA (agency) training. There was acknowledgement of the Agency pride in CMEL and the excitement around its future.
 - c. The intent of the conference is to identify SIR information that may affect the success and cost of performance, and to allow bidders an opportunity to view the worksite. It is our intention to do this by clarifying the requirements through general discussion regarding the SIR.
 - d. Anticipated outcome that is Offerors will be able to satisfy themselves regarding resources, general provisions, and local conditions affecting the performance and cost; Proposal preparation to reflect the requirements and resources required; and the evaluation of competitive, responsive, and realistic proposals.
 - e. The SIR Section L contained a request for questions prior to the pre-proposal conference with the intent of preparing answers that may be provided during the conference. The questions received prior to and during the pre-proposal conference will be consolidated and answers will be documented and provided to the attendees electronically.
 - f. Provided the reminder to the audience that any statements made at the conference (or statements made that are not incorporated by SIR amendment) WILL NOT BE BINDING on the government nor will these statements change requirements of the Screening Information Request (SIR) unless the changes are incorporated into the SIR in the form of a formal amendment.
 - g. Acknowledged that the IPT has identified errors in the SIR package and they will be corrected by SIR amendment. The amendments will be posted to the website, www.fedbizopps.gov. The official minutes of the conference will also be provided to all conference attendees.
-

- FAA CMEL Program Manager, Shep Curl provided a power point presentation on CMEL which included distribution of CMEL marketing CD. The presentation included the history of CMEL, its mission, franchise operations, customers were identified as FAA and others, and he identified popular courses.
- FAA CO Avis Franklin provided an overview of the agenda for the day then took a 15-minute break. The overview included the following:
 - a. As CO authority to act as your interface with the Center for Management and Executive (CMEL) Leadership. All interface should be directed through the CO/Avis Franklin. As CO responsibilities include ensuring that each offeror receives fair, impartial and equitable treatment during the acquisition process. CMEL AMA-3 (team members) should not be contacted.
 - b. CO responsibilities are to receive and answer questions you may have about the SIR or the CMEL facility up through the time of contract award. Any answer that effects the overall requirement will be incorporated by Amendment and posted to the website. Answers to questions that are submitted at the conference, and those that affect the overall requirement will be posted to the website for all bidders to have access to the information.
 - c. CO identified the acquisition as a competitive SEDB/8A set aside for small businesses. The NAICS code is for Professional and Management Development Training 611430. Acknowledged the correction of NACIS Code to 64330 and posting to www.fedbizopps.gov as SIR amendment 0001 to ensure quality training for Executives and managers within the agency as it relates to the agency mission. Amendment 0001 corrects the address for submittal.
 - i. Identified SBA support and guidance for SEDB/8A's and provided reference to AMQ Small Business liaison/Gerald Lewis. Acknowledged the SBA as the proper source for guidance on teaming arrangements and certifications.
 - d. An over of the conference agenda includes the SIR overview, PWS overview, Vendor questions, and facility tour. The SIR will be addressed to assist bidders in understanding the requirements and the potential cost.

Break

- CO Provided SIR overview:
 - a. The support services described here in are non-personal services, for operational support and instructional support services. The scope of work is defined in the PWS.
 - b. The FAA seeks to establish support and pricing for a five-year period that consists of a transition period, base year, and four one-year option periods to be exercised at the option of the government.
 - c. The beginning of the transition period is expected to be 22 AUG 2007- 30 Sept 2007. The base year will begin 1 Oct 2007 through 30 Sept 2008. Annual one-year options will begin each Oct.
 - d. The contract type is a hybrid of fixed pricing, fixed pricing per instructor day, and time and material.
 - e. The Section B estimates and your pricing will set the estimated value for each Contract line item. The sum of CLINs will result in the total annual price, and resulting total contract value if all options are exercised.

- f. Identified the contract type as a hybrid pricing arrangements to allow flexibility to accommodate changes in delivery of Instructional services, to accommodate funding availability, and out of agency requirements for training.
- g. Acknowledged the proposal close date as identified on the Form Page posted to the website (SF33). Should you decide to submit a proposal you must submit in accordance with the instructions provided in this screening information request. The close date for proposal submittals is March 26, 2007, 4:00 PM. The submittal must be sent to the Aero Center Office of Acquisition Bid and Proposal Officer (AMQ-100) Rm. 313, OKC, OK. Extension of the SIR close date is not anticipated.
- h. This is a five-year contract with base period with 4-year option periods with a transition period.
- i. The services to be delivered and performance are indefinite delivery/indefinite requirements described in Section B. The Contract type is a hybrid of fixed price, T&M and cost reimbursement applicable to each CLIN. SIR Section B provides estimates and pricing estimates to establish the total cost per CLIN, and estimated annual cost. . The estimated dollars in Section B are only projections.
- j. The requirement and contract definitions are identified in the SIR Section C (which references attachments).
- k. The SIR Section D, E & F and G address administrative provisions for doing business with the FAA.
- l. The transition period expected to begin August 22nd.
- m. Section H unique and prescribed provisions for this FAA agreement. This section includes security requirements that will be coordinated through FAA Southern Region, (Atlanta office). Questions regarding security requirements may be directed to the designated offices identified in the clauses.
- n. Section I identifies AMS provisions of the agreement and the employee certification that must be completed, and Section J list attachments to the SIR.
- o. Section K identifies certifications that must be completed and returned with the proposal.
- p. Instructions to offerors are identified in section L, and are to be used to format the preparation of your proposal, and the selection criteria are described in Section M.
 - i. The Instructions to Offerors, Conditions and Notifications are described in Section- L. The submittal must include the SIR, Technical Proposal, and Cost/Price Past performance proposals. The proposal should represent your capability to deliver the services, your approach to meeting the requirements, and validation of experience supporting your submittal. The submittal should be complete, realistic, and reasonable for the defined requirement. This includes completion of all fill-ins of the AMS clauses, and acknowledgement of the disclosure statement in the SIR Section I – entitled Disclosure of Certain Employee Relationships and Section K Certifications.
 - ii. It is our intent to issue the contract from provisions of the SIR. If modifications to the contract terms and conditions are necessary and agreed upon through discussions, those modifications will be incorporated accordingly.
 - iii. The SIR provides provisions should you desire to provide alternate language. The modifications may be requested by the offeror IAW L.11 – to be submitted with your proposal.

- q. The close date is for proposals submitted in response to the SIR is currently 3/26/07, and award is anticipated this summer. Proposals must be submitted in hard copy (paper) and disk copies may accompany the submittal. Do not email proposals.
- r. Parameters of the contract summarized by identifying administration of an ID/IQ contract, with a minimum guaranteed as specified in dollars. Delivery orders will fund the contract and identify services to be performed. Task orders will be documented and will specify deliverables, ceiling estimates, and schedules parameters for contract. Coordination to occur through the Program Manager via regularly scheduled meetings.
- s. Offerors are encouraged to submit their best terms from a cost and technical perspective on the initial offer since there is no requirement to hold discussions and if they are held, the FAA is not required to hold discussions with all offerors. Only the contents of the proposal will be considered in the evaluation
- t. In accordance with AMS policy, the FAA may communicate with one or more offerors at any time during the SIR process. Communications with one offeror does not necessitate communications with other offerors since communications will be offeror specific. Information determined to have common application and not considered prejudicial to offerors will be communicated to all offerors.
- u. All submittals will be evaluated by an evaluation team using pre-established standards in the technical evaluation plan. The plan has been developed using evaluation criteria specified in section L of this SIR.
- v. The technical evaluation plan is an internal document and it is not available to anyone but the team members and the contracting officer.
- w. All evaluation factors for award are found in section M. Contract Award will be made on the basis of "Best value to the FAA". The technical factors are significantly more important than cost. Past Performance references will be used to validate the accuracy of past performance history to determine a confidence rating as perceived by the FAA.
- x. Important considerations in the delivery of these services:
- Projections are estimates only – the deliverables will be tasked.
 - Actual requirements will be tasked in accordance with the task ordering process identified in the SIR. Support tasks are also important in addition to the instruction, and it is designated as fixed price paid monthly. Coordination will be required thus prepare for those services on an annual basis understanding the amount of effort required.
 - CO will delegate authority to an AMA-3 Technical Representative as the primary interface between the contractor and AMA-3. The COTR must be informed of the Contractors' intent and status to complete tasks. The tasks and status must be documented and submitted to the CO.
 - The FAA reserves the right to design, develop, and conduct courses, seminars, conferences, and meetings with government personnel or through third parties under separate contract.
 - The FAA reserves the right to design, develop, and conduct courses, seminars, conferences, and meetings with government personnel or through third parties under separate contract. Therefore, the contractor performing under this contract will not have exclusive rights to provide all services required to support CMEL.

ADJOURNED FOR LUNCH:

- PWS Overview provided by FAA CMEL Program Managers (K. Concannon and R. Sappington)
 - a. AMA –3/K. Concannon identified the workload of CMEL that is core work from FAA Human resource curriculum (approximately 75% of work) and non-core customers representing all other work. A web link is provided in the PWS to view the curriculum. The scope of work for this requirement includes operations, management, and administrative staff; instructional services, and instructional design. FAA Agency demands and funding drives the core requirements. These requirements will be obtained through tasked services. The core requirements are usually know during the May – June time frame for the upcoming fiscal year. The other requirements will be unknown and at times short notice for tasked services. Normal business hours for CMEL are 8AM-5 PM and there are few occurrences for support after these hours. FAA furnishes the facility space, desk, computers etc. as identified in the PWS. The Contractor has been asked to provide the copier. The volume work required for CMEL is sent out. Therefore the Contractor furnished copier will be utilized for copies need in short turn-around.
 - b. Appendix A provides the Task Descriptions, Appendix B the position descriptions and qualifications and Appendix C is the estimated workload based on three years of history. Appendix C is based on four categories and cost proposals will be based on these categories. Category Four was left off and will be corrected in the amendment to the SIR. Category 1 – 3 are based on instructional services and Category 4 is straight facilitation of a meeting requiring no instructor notes, preparation, follow-up or assessments. For Category 1 -3 the main focus is on the content of the course with Category 1 instructors don't have pre-work or assessment outside the classroom or grading responsibilities and course work is predictable. Category 2 course work is predictable but with more learner centered training and no workload outside of class times. Category 3 Classes do have assessments and are highly interactive with students. There are sessions outside the regular course delivery.
 - c. AMA-3 R. Sappington addressed FAA certification is identified as agency specific Instructional requirements to ensure capability to deliver Instruction relative to FAA mission. The contract manager is responsible for the assessment of capability. The contractors can decertify instructors who have performance deficiencies, and the FAA can give input, which can result in decertification. Recertification is the correction of all deficiencies in any particular instructors who have lost certification temporarily
 - d. Additionally, professional development should be identified for all Instructors to include professionalism, currency in knowledge areas and ISD methods. Instructors must earn continuing education credits at least every 2 years in accordance with the PWS, and shadowing is an essential part of the professional development. The Professional Development will be coordinated between the Contract Program Manager and the FAA COTR.
 - e. AMA-3 K. Concannon – discussed Key Personnel – identified as Program Management personnel to be dedicated to the program as full-time. The Program Manager will be responsible for attendance at weekly PMR's to update schedules for deliveries. The FAA AMA-3 staff and Program Managers will identify changes and/or update status. The Operational Support workload is generated from workload as projected in Appendix C.
 - f. Transition requirements are identified in the PWS and should be described in the proposal in accordance with Section L – technical factors. Reports are identified via CDRLs. The FAA recognizes that these reports may be tweaked (for format) after award.
 - g. AMA-3 R. Sappington – Instructional Services are to include generalist, experts in state of the art management and leadership skills and theory, and FAA unique expert areas to include blended learning models of distance methods in combination with fact-to-face delivery of training. The standard is 028C and congressional guidelines that are required for any training provided with tax dollars. The PWS identifies the required

Instructional competencies, standards and specific expertise. The quality of these deliveries must include the bullets identified on page 14 of the PWS.

h. AMA-3 - K. Concannon –identified a correction to be made to the PWS Appendix calculation for FTE --- from 1820 to 1840 page 17. In the submittal of the proposal resumes and the quality plan are not included in the page limit. Task Descriptions are identified for Program Management and Operational support staff, as well as Instructional Services, and Instructional Design. Review the position descriptions for expected duties.

i. AMA-3 - K. Concannon --- The Health Awareness duties were specifically discussed acknowledging the requirements for classroom support as identified in Appendix C – health Awareness coordinator. When the Health Awareness Coordinator is not in the class analysis may be conducted for students, keeping HA info available, CPR, nutrition first aid. The nominal workweek for the Health Coordinator is potentially 2-3 deliveries per week.

j. Research and Evaluation includes the traditional Level I, Level II and Level III of the Kirkpatrick course evaluation. These 3 levels are Student feedback, implementation on the job, and impact on organizational effectiveness. In the future, the FAA may require level 4 and level 5. Level 4 is impact on the organization, and Level 5 is return on investment.

k. Publications: The creativity and work is very critical to ISD lead, current FAA policy for branding is applicable to webpage design and all other publications. Ref. the website for Instructional service delivery at CMEL (also known as “in residence”), field, CBI, consulting, teaching in the “train the trainer” mode to enable customers to do their own deliveries for instruction.

j. It is anticipated that course design will follow the ISD process, with one delivery prototype. The course will then obtain an established price via negotiation and contract mod to incorporate the course for subsequent routine deliveries. The tasked requirements for ISD will require a specific timeline response.

CO clarifications:

- Ref. Section L Technical Factors included transition phase. Notice in Section B, the Phase-out CLINs are identified as “to be negotiated” since it the time and requirements are not known by the government at this time.
- Ref. CLIN 1 – Phase in to be priced should be priced and we have anticipated those cost to be not separately priced (NSP) but included in CLIN 0002 – Operational Support.
- Ref. CLIN 0003 and 0004 both describe Instructional service for both on site and field delivery.
- Ref. SUBCONTRACT CLIN: This is Subcontract support for Subject Matter Experts (SME’s) as requested by the FAA to assist/enhance a course delivery. The source of SME shall not be directed by the FAA. The FAA may define the qualifications (only) and although the FAA reserves the right to review the qualifications and or concur with the proposed subcontract support prior to performance. The CO or delegated authority will provide concurrence for any SME obtained via this CLIN.
- Ref. Appendix E -Task Order Sample; Requirements will be coordinated through the Program Manager via the standard format with a specific time frame for respond. This Appendix is a sample of what is expected for execution, a word document summarizing the technical approach or specific info may be attached. This should not be a full-blown proposal. We recognize that documents may be tweaked based upon feedback received from both parties. The purpose is to simply the documentation of deliveries required by having an established process.

- Ref. Section L – Section L.3 – SIR – includes forms including any amendment as issued and address on cover sheet. We limited proposal to 50 pages with exception to Quality Plan and Resumes. Pricing to be on a competitive basis and reasonability on submittal and not necessarily looking for lowest price but best value. Looking at past performance and your requirement to submit this information for review or if no history then considered neutral and risk will be assessed. Technical proposal has significant more weighting than cost proposal.

QUESTIONS: Addressed questions received from SIR issuance to date (received during the conference from the floor)

1. Ref. CLIN 2: How do you estimate resources required for operational support from information provided? – if not specified as not full-time then can't judge how much time is anticipated for the position?

ANSWER: The position descriptions define positions that are full-time. We had anticipated that undefined effort would indicate these functions as an opportunity for the offeror to meet objectives with quality, skills and experience of personnel assigned between jobs. The Health Awareness position was identified as a position that would require correction to quantify efforts since delivery includes classroom and availability for health assessment. CMEL will make all changes in the amendment to address this question.

2. Ref SIR clause H.22 Key Personnel and PWS clause entitled Key Personnel. Is it the intent to include all operational support as key personnel?

ANSWER: Quality is a major issue and qualifications will be reviewed for resources supporting operational support. In addition, we will review the Draft Quality Control Plan for contractor proposed implementation plan. The draft Quality Control Plan should encompass the entire requirement. Travel reimbursement would include transportation and subsistence expenses incurred while in travel status. Shadowing will most often be tied to a field delivery where travel is already required and authorization would be specifically provided to the contractor to include the shadowing opportunity.

3. What are the expectations for continuation of instructor staff?

The FAA will not determine or direct the hire of any contract employee or instructor. It is in your best interest to establish personnel resource based upon expertise and not current employment.

4. Can you tell us about the current sources of support?

The services are currently provided by three sources FAMDA is a joint venture (with ASC) and they provided Instructional support. The other two vendors are Valdez International who provides administrative and assessment support, and Vetter Inc. provides technical support. All three have been performing for the last five years and maybe longer. I will refer any additional questions to those sources for information about their contract support.

5. Could you clarify more on course cancellations, will there be reimbursements of cost if outside the 10 days?

The task order will specify when and where the deliveries are required, and your response should identify your intended approach (i.e. support can be assigned, who will be assigned, when they will initiate prep, travel (if applicable), the applicable fixed price per instructor day etc. The FAA will provide concurrence or discuss the response, both parties should be aware of the scheduled date for Instructor incurred cost, thus if we do not notify you by a certain time Instructor cost will be incurred. In addition, we expect the proposal submittal to identify the parameters for cancellation, or modifications proposed to the cancellation provision/language currently identified

in the SIR. Ordinarily you would/could only be paid for effort that has been executed. Terms will be facilitated in accordance with the agreed upon provisions.

6 If a tasked delivery gets cancelled how will the contractor be reimbursed?

FAA will review the current language to identify or clarify how the contractor can recoup costs for cancellation.

7 Is there a connection between Appendix C designation of Level 3 & 4 and quality?

There is no distinct connection other than how the proposed quality will be met and reflected in the competencies among students. Implementation of quality should be addressed by AMA-3. Roberta – is still speculative – impact on customer –Level 4 and ROI Level 5.

8 Web Designer description appears to combine technical support currently provided for services. Request clarification of level of effort required for non-full time positions. (ref. questions and answers)

- The CO provided appreciation to all Contractors for their interest and attendance. The Conference was adjourned for the Facility tour provided by John Leuth, and the tour was complete approximately **3:30 PM**.